## HIPR-SONIC Schedule Analysis Tool National Aeronautics and Space Administration

(Super Omniscient Nifty IMS Comparator) 2015 NASA Cost Symposium / Schedule Community Of Practice (SCOPe) Meeting





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## **Background**

- HIPR-SONIC = Highly Improved, Processed Refined SONIC
  - SONIC<sup>5</sup> = Super Omniscient Nifty IMS Comparator, 5<sup>th</sup> major revision
    - SUPR-SONIC = Special Update Per Requests, 4<sup>th</sup> major revision
    - Original draft, 08/06/2013
- Developed to support GSDO PDR
  - Streamlined schedule analysis process while improving data integrity
  - Supported reports presented to ESD and Management Councils
- Received Associate Administrator Office of Evaluation (OoE) Award
  - Recommended by SRB members to submit for Professional Society Award competition
- ◆ Shared with NASA Schedule Analysis Working Group, April 2015
  - Applicability to other NASA P/p or centers
- Expanded use within GSDO
  - PP&C
  - VAB
  - GSI/C3





## **Background (cont'd)**

## GSDO Life Cycle Review (LCR) Support

- Initiated during preparations for Preliminary Design Review (PDR)
- Created to support Joint Confidence Level (JCL) Analysis Schedule development from Program Integrated Master Schedule (IMS)
  - GSDO IMS maintained in Primavera
  - GSDO JCL Analysis Schedule developed in Microsoft Project
    - Enable compatibility with external stakeholder tools
- No pre-existing software or tool existed to compare schedules from different COTS applications
- Schedule converters imperfect
  - JCL Analysis Schedule needed to represent IMS, but at higher level
    - Approximately 8000 IMS activities vs. 1000 JCL Analysis Schedule activities
      - Note: Current IMS: Analysis Schedule still 8:1, but grew by factor of 5!
    - Aligned activity start dates and finish dates
    - Mapped program risks to schedule activities
    - Consistent Critical Path
  - Created customized Schedule Health Checks (Metrics) for LCR needs



### SONIC<sup>2</sup>

- Responsive development process to incorporate (and anticipate) needs of end-users
- Improved program robustness to accommodate broader user base
  - File import capability eliminate needs for extensive data pre-processing
    - User includes relevant data fields with specified column title
    - IMS from Primavera or MS Project
    - JCL Analysis Schedule from MS Project
      - Requires, *comma-delimited*, custom field identifying all IMS activities associated with analysis schedule activity (*Detail Schedule Map*)
  - Extend analysis schedule comparison for schedule revision analyses





#### **SUPR-SONIC**

## Improved program capabilities to support evolving LCR needs

- Updated Metrics and added analyses not available in COTS tools
  - Identify ALL activities that can influence specific activity (predecessors)
    - Also identify ALL activities that can be influenced by specific activity (successors)
    - Batch mode capability that flags user-selected subset of activities
  - Determine connectivity of two schedule activities, identifying up to 4 paths
    - Updated with Batch mode capability
  - Keyword Search Reports from IMS Descriptions, Predecessors and Successors





## **HIPR-SONIC** (and Beyond)

- Optimized source code for more efficient data handling, faster run times and improved error trapping
- Split application code and database into separate files
  - Allows users to manage data in separate files
  - Less software "overhead" by not loading files with many schedules
  - Simplifies shareability of software with data files
- New ideas?
  - More detailed IMS / Analysis Schedule analyses
  - Schedule Assessment reporting / plotting





## **SONIC – ONCE Model Portal Title Page**

www.oncedata.com

#### SONIC

#### **General Info**

SONIC (Super Omniscient Nifty IMS Comparator) is a schedule analysis tool developed to bridge the gap between COTS scheduling tools, providing assessment capability to ensure schedule health, activity alignment and traceability of content.

Assessment capabilities are divided into modules, which include:

- Metrics
- > RABBIT (Recursive Analysis By Backwards IMS Tracing = Predecessor & Successor Identifier)
  - BACON (Backwards Activity Chaser of Need)
  - DateCompare (Analysis Schedule to IMS Alignment tool)
    - S2S (Schedule to Schedule Comparator)
  - > BurnsBacon (Batch Utility Runs Numerous Schedule IDs for BACON)
  - > Bullseye (Batch Utility Looking Logically for Schedule Entities You Expect)
  - > PEEK-A-BOO (Probing Expressive Element Keywords and Bearing Orderly Outputs)

The software runs in a MS Excel environment and provides import capabilities from Microsoft Project and Oracle Primavera.

#### **Points of Contact**

Developer (ALL POINTS LOGISTICS): Howard Kanner, <a href="https://howard.s.kanner@nasa.gov">howard.s.kanner@nasa.gov</a>

KSC GSDO: Brian Rutkowski, brian.j.rutkowski@nasa.gov

HQ CAD: Arnold Hill, <a href="mailto:arnold.a.hill@nasa.gov">arnold.a.hill@nasa.gov</a>

All users are recommended to review the SONIC 101 charts for guidance.



## **Summary of SONIC Modules**





## **SONIC Input File Mappings**

Input file must conform to these column names

**SONIC** maps to these column names

Primavera Layout	MS Project Field	SONIC IMS
Field Name	Name	Template
Activity ID	ID	Schedule ID
Activity Name	Task Name	Description
Remaining Duration	Remaining Duration	Rem Duration
At Completion Duration	Duration	Duration
Activity Type	-	Task Type
Start	Start	Start
Finish	Finish	Finish
Successors	Successors	Succeeding
Predecessors	Predecessors	Preceding
Critical	Critical	Critical
Free Float	Finish Slack	Free Finish Float
-	Start Slack	Free Start Float
Total Float	Total Slack	Total Finish Float
-	Free Slack	Total Start Float
GSDO-SRB Notes	-	GSDO SRB Notes
<b>Primary Constraint</b>	Constraint Type	Constraint
Calendar	Task Calendar	Calendar
(GSDO) Risk ID	(JACS) Risk ID	Risk ID
neto ha	Milestone	
1 1 -	Rollup	

MS Project Field	SONIC JCL	
Name	Template	
ID	ID	
Task Name	Name	
Start	Start_Date	
Finish	Finish_Date	
Remaining Duration	Remaining_Duration	
Duration	Scheduled_Duration	
Predecessors	Predecessors	
Successors	Successors	
Detail Schedule Map	Detail_Schedule_Map	
Constraint Type	Constraint_Type	
Finish Slack	Finish_Slack	
Start Slack	Start_Slack	
Total Slack	Total_Slack	
Free Slack	Free_Slack	
Milestone	Milestone	
Rollup	Rollup	
Critical	Critical	
Task Calendar	Task Calendar	
(JACS) Risk ID	Risk ID	
-	Task Type	



#### **Health Checks / Metrics**

- Access to file import functions, SONIC Restart
- Access to Metrics tool
  - Provide summary of schedule activities with typical metrics such as:
     Task Type, Constraints, Float, Predecessors, Successors, Criticality
  - Provide metrics for tracking activity completion
  - Provide in-depth summary of Normal activities
  - Provide Error Checking of Start and Finish Dates
  - Provide summary of linked calendars and mapped risks
- Access to other analysis modules
  - RABBIT Hole (Predecessor & Successor variants), Six Degrees of BACON, and PEEK-A-BOO
    - Provide schedule predecessor/successor analysis, schedule activity connectivity determinator, and IMS keyword search capability
    - (Details to follow...)

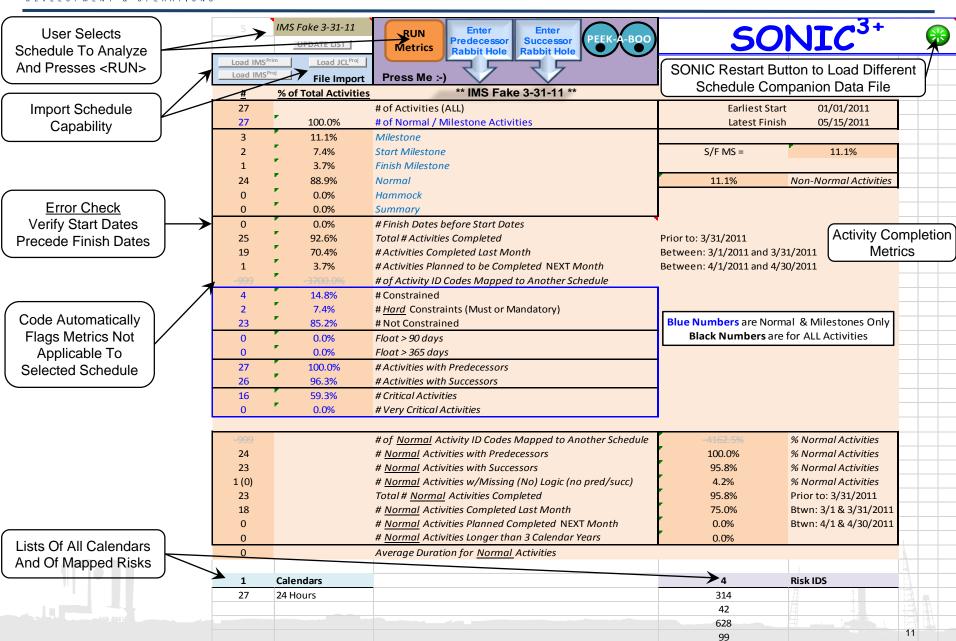
#### Limitations:

Maximum of 59 Risks & Calendars will be listed for given analyzed schedule



#### **Metrics**







## RABBIT Hole [TEMS] (Recursive Analysis By Backwards IMS Tracing)

- Located on Metrics worksheet
- ◆ Uses same Schedule selection as *Metrics* analysis
- Expanded to include directional variants
  - Predecessor Chaser
  - Successor Chaser
- User enters Schedule ID in pop-up dialog box
  - Defaults to 1<sup>st</sup> Activity ID in schedule
- Outputs alphabetical list of all preceding activities
  - Identifies Activity ID, Description, Task Type, Criticality, Start & Finish Dates
  - Summarizes # Predecessors & Successors to identify major nodes
- Provides export capability into CSV formatted file (Under Development)
  - RABBIT DROPS (RABBIT Data Reducer for Outputting Project Schedule)
    - Primavera export not viable due to limitations on Primavera Import Fields
    - MS Project Export achievable via CSV file, but not all fields
      - Open file, import with New Map, ignore errors for calendar names...
- Limitations:
  - Schedules must be imported in IMS format



# Six Degrees of BACON STEMS (Backwards Activity Chaser of Need)

- Located on Metrics worksheet
- ◆ Uses same Schedule selection as *Metrics* analysis
- User selects from pull-down list search algorithm
  - Varies how path determined by direction of reading activity predecessor list
- User enters Schedule IDs in pop-up dialog box
  - Defaults to values of previous run
- Provides sequence from latest activity back to earliest activity
  - i.e. follows predecessors backwards, identifying Task Type and Float

#### Note:

- Will reverse activity order if necessary (i.e. ID2 is successor of ID1)
- Will identify if no connectivity exists

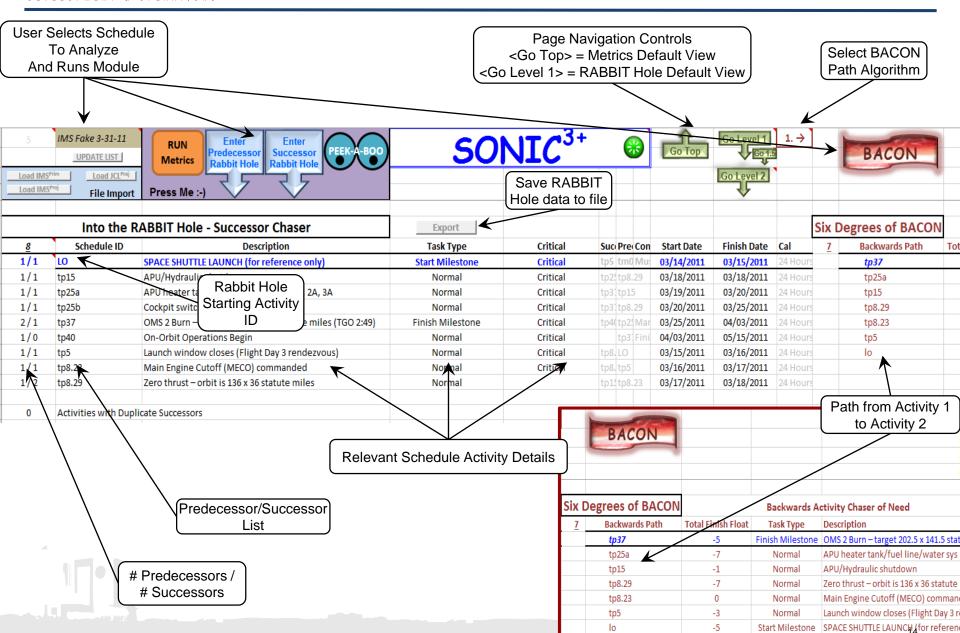
#### Limitations:

- Schedules must be imported in IMS format
- Multiple paths are possible, and no guarantee to find shortest, longest or most critical path



# RABBIT Hole and Six Degrees of BACON







#### PEEK-A-BOO

#### EMS(Probing Expressive Element Keywords and Bearing Orderly Outputs)

- Located on Metrics worksheet
- ◆ Uses same Schedule selection as *Metrics* analysis
- User selects search data field (Description, Predecessors, Successors)
  - Defaults to Description
- User enters Keyword Search String in pop-up dialog box
  - Defaults to previous search keyword
- Outputs alphabetical list of all activities with keyword in Desired field
  - Identifies Schedule Activity ID, Description, Task Type, Criticality,
     Start & Finish Dates, Constraints, Successors, Predecessors and Calendar

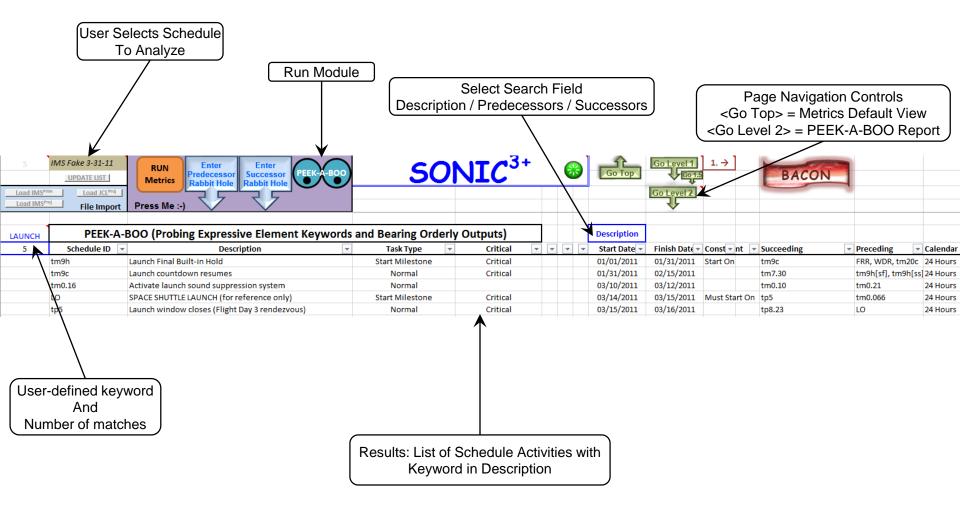
#### Limitations:

Schedules must be imported in IMS format



#### PEEK-A-BOO







## **Date Compare**

- Calculate Delta Start and Finish Dates of JCL Analysis Schedule to IMS
  - Uses custom data field that associates Analysis Schedule activity ID with set of mapped IMS activity IDs
  - Determines Earliest Start / Latest Finish Dates
  - Identify activities with varying degrees of mismatch ( > 2; >30; > 365 days)
    - Low-end value can be varied from 1-9 days, allowing for round-off errors
  - Identify activities with offset Start Date, but same Duration
  - Identify mapped activities not in IMS
- Calculate activity durations via multiple methods to validate consistency
- Compare activity criticality from mapped activities to JCL Analysis Schedule

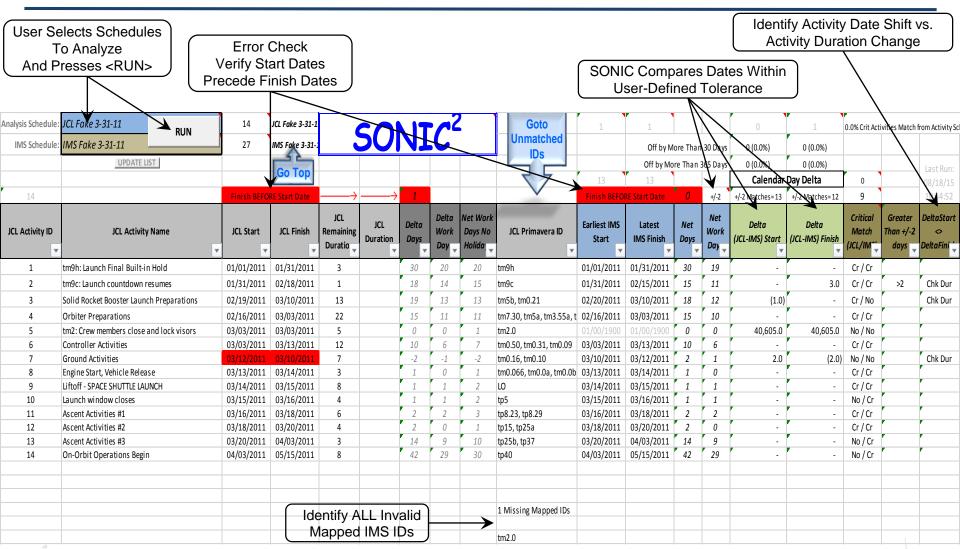
#### Limitations:

- Analysis Schedule data must be on Worksheet with root name "JCL"
- IMS data must be on Worksheet with root name "IMS"



## **Date Compare**







## Schedule-to-Schedule (S2S)

#### Calculate Delta Start and Finish Dates of two like schedules

- Use schedule ID as common link
- Identify activities with varying degrees of mismatch ( > 2; >30; > 365 days)
  - Low-end value can be varied from 1-9 days, allowing for round-off errors
- Identify activities with offset Start Date, but correct Duration
- Identify mapped activities not in IMS
- Calculate activity durations via multiple methods to validate consistency
- Compare activity criticality between two schedules

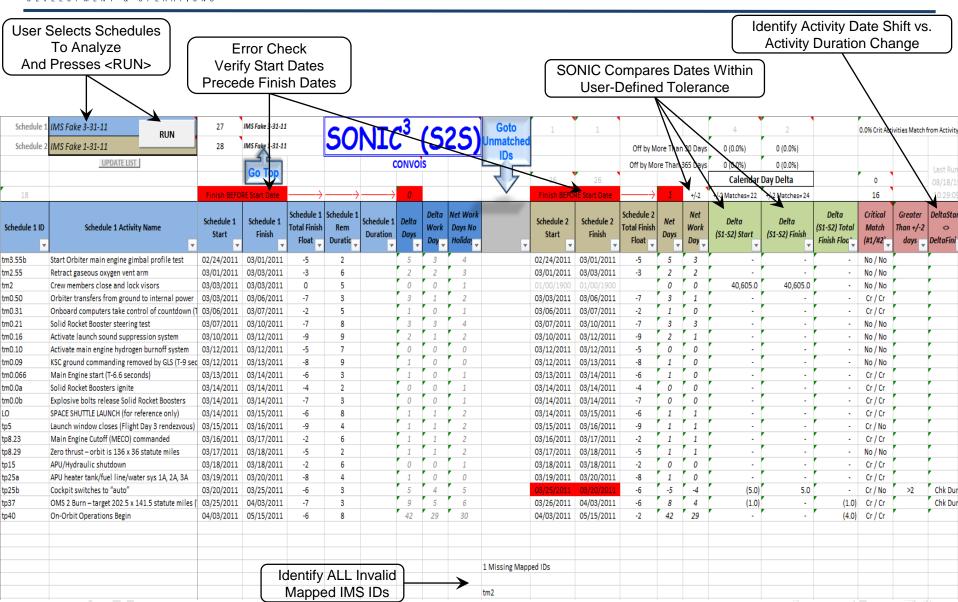
#### Limitations:

- Schedules must be imported in IMS format
- 1st 3 characters of Worksheet name must match for each schedule



## Schedule-to-Schedule (S2S)







# BURNS BACON STEMS (Batch Utility Runs Numerous Schedule IDs)

- Located on BurnsBacon worksheet
- ◆ Batch mode of Six Degrees of Bacon
- User provides schedule activity ID pairs and Bacon Search Mode
  - Activity Pairs = Schedule Activity IDs
  - User selects search mode from pull-down list for each Activity Pair
- Provides sequence from latest activity back to earliest activity
  - i.e. follows predecessors backwards
  - Text field with user-defined delimiter

#### Note:

- Will reverse activity order if necessary (i.e. End is successor of Start)
- Will identify if no connectivity exists

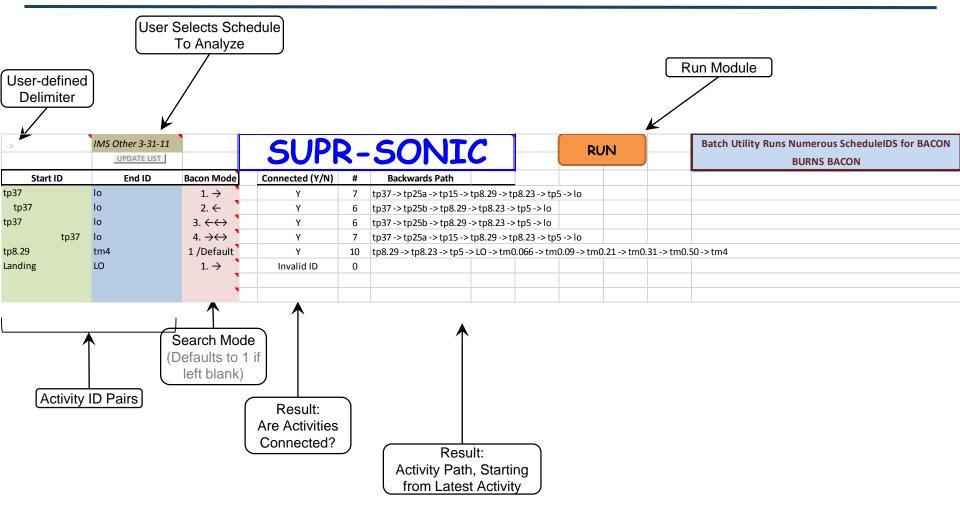
#### Limitations:

- Schedules must be imported in IMS format
- Multiple paths are possible, and no guarantee to find shortest, longest or most critical path



#### **BURNS BACON**







## **BULLSEYE**

#### EMS (Batch Utility Looking Logically for Schedule Entities You Expect)

- Located on Bullseye worksheet
- ◆ Batch mode of RABBIT Hole (Predecessor Chaser)
- User provides Schedule Activity ID and ID prefixes
  - ID prefix = comma-delimited list of Schedule ID classes
  - No prefix = All Predecessors
- ◆ Results = Predecessor list of Schedule Activity IDs with desired prefixes
  - Also provides Descriptions and Task Type
  - Results "flattened" = delimited by user-specified delimiter (Default = "|")
    - Allows post-processing within MS Excel using Data/Text-to-Columns
  - User limits Descriptions length (Default = 32, Max = 128)
  - Flags Schedule Activity IDs not found = -999

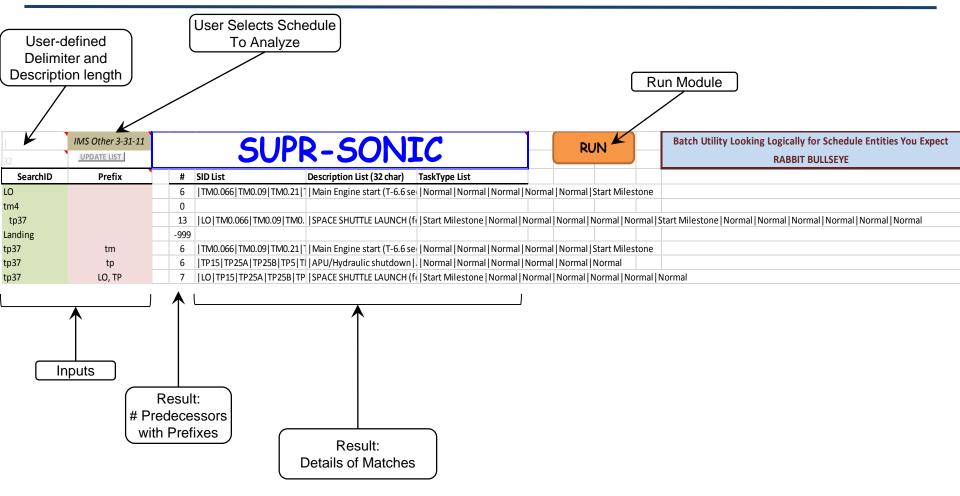
#### Limitations:

Schedules must be imported to IMS format



#### **BULLSEYE**







## Developed "How to's..."



#### **How to Import IMS from Primavera**

#### IMS from Primavera

- . Export Schedule into MS Excel with Column Titles in Row 1
  - · Create SONIC layout with desired data fields (order not important)
  - · Select All <Ctrl-A>, Copy into Clipboard <Ctrl-C>, Paste into new XLS file <Ctrl-V>
  - Note 1 Method allows importing entire schedule made up of multiple projects
  - Note 2 Section headers are mapped to "Summary" tasks
- Open SONIC
- Goto Metrics Worksheet
- Press <Load IMSPrim> Button
- Using File Dialog, locate exported file and press <Open>
  - . If file has more than 1 worksheet, select desired worksheet
    - Only 1<sup>st</sup> two worksheets can be imported
- Enter IMS Data Date
- · Rename "IMS" in worksheet name to custom 3-character code per user needs
- - -
- Post-Processing Recommendation:
  - Filter imported schedule in SONIC and delete activities with no content, such as Summary (from section headers)



#### How to Import IMS from MS Project

#### IMS from MS Project

- Save As> Schedule into MS Excel (.xlsx)
  - . Create custom Map to export desired fields
  - Update MS Excel field names as needed
- Open SONIC
- Goto Metrics Worksheet
- Press <Load IMS<sup>Proj></sup> Button
- . Using File Dialog, locate exported file and press <Open>
- . If file has more than 1 worksheet, select desired worksheet
- Only 1<sup>st</sup> two worksheets can be imported
- Enter IMS Data Date
- Rename "IMS" in worksheet name to custom 3-character code per user needs
- Enjoy ☺



### GSD How to Import Analysis Schedule from MS Project

#### Analysis Schedule from MS Project

- <Save As> Schedule into MS Excel (.xlsx)
  - Create custom Map to export desired fields, updating MS Excel field names as needed
- Open SONIC
- Goto Metrics Worksheet
- Press <Load JCL<sup>Proj></sup> Button
- . Using File Dialog, locate exported file and press <Open>
  - If file has more than 1 worksheet, select desired worksheet
  - Only 1<sup>st</sup> two worksheets can be imported
- Enter Analysis Schedule Data Date
   Enjoy ©



#### **How to Start Using SONIC-Share**

#### Open SONIC - Share

- · Note: No schedules included
  - · Placeholder Worksheets are included with made-up data
    - SONIC requires 1.ICL 1 IMS and 1 other worksheet in addition to software
      - Metrics, DateCompare, S2S, BurnsBacon, IMS Blank and JCL Blank required last six (6) worksheets of SONIC
- Import schedules
  - · Follow instructions on following pages to import Primavera and Project schedules
  - . User may rename "IMS" to custom 3-character code to create other schedule
  - Create sub-system schedules
  - Maintain end of worksheet name as date ("ABC description 3/14/15")
- Run Modules
  - Metrics for any schedule
  - DateCompare for JCL and IMS schedule
  - . S2S, RABBIT Hole and BACON for non-JCL schedules
- Eniov ۞





#### **How to Compare Like Schedule Dates**

#### Compare Like Schedule Dates

- Open SONIC
- Goto S2S Worksheet
- · Select desired Schedule from drop-down list in cell B1
- . Select desired Schedule of same type from drop-down list in cell B2
- Press <Run>
- · Press <Goto Unmatched IDs> button to scroll to list of missing IDs
- Press <Goto Top> to return view to top of page
- Enjoy ©



#### How to Identify Predecessors/Successors

#### ♦ Identify Predecessors/Successors (Into the RABBIT Hole)

- Open SONIC
- Goto Metrics Worksheet
- . Select desired schedule to analyze from drop-down list in cell B1
- Press <Enter Predecessor RABBIT Hole> or <Enter Successor Rabbit Hole>
- Enter Activity ID in pop-up dialog box
- Enjoy ©

#### To Export results

- Press <Export> located next to "Into the RABBIT Hole" title block
- Enjoy ☺





#### How to Determine Activity Connectivity

#### ◆ Determine Activity Connectivity (Six Degrees of BACON)

- Open SONIC
- · Goto Metrics Worksheet
- · Select desired schedule to analyze from drop-down list in cell B1
- Select desired path algorithm from drop-down list in cell K1
- Press <BACON>
- . Enter Activity ID 1 in pop-up dialog box
- Enter Activity ID 2 in pop-up dialog box
- Enjoy ©



#### **How to Delete Schedules**

#### Delete Schedules

- Open SONIC
- . Delete Worksheets with unwanted schedules
- Goto Metrics or DateCompare Worksheet
- Press < Update List>
- Enjoy ©

#### Common Error:

User deletes/renames Schedule name and does not press <Update List>



### **SONIC Limitations**

- Dates follow U.S. convention m/d/y
- Source file column titles must match desired labels
  - No limitation on order/sequence of data columns
- ◆ 7 Worksheets of App File must be *Metrics*, *DateCompare*, *S2S*, *BurnsBacon*, *Bullseye*, *IMS Blank* and *JCL Blank*
- ◆ 3 Worksheets of Companion File must be JCL\*, and two IMS\*
- Module-specific limitations, as identified above



## Back-Up





#### **SONIC 2.0 Features**

#### Automate loading & pre-processing of Primavera and Project input files

- Primavera IMS File Import
  - Create Start/Finish Dates for Finish/Start Milestones
  - Change Task Type "Task Dependent / Resource Dependent" to "Normal"
  - Change Task Type "Level of Effort" to "Hammock"
  - Change Task Type "" to "Summary"
  - Change Criticality formatting from "Yes/No" to "Critical/\_"
  - Convert durations and Float/Slack to numbers (from "#d")
  - Format dates to mm/dd/yyyy
- Microsoft Project File Import
  - Calculate Task\_Type from Milestone and Rollup data fields
  - Convert durations and Float/Slack to numbers (from "# day(s)")
  - Change Criticality formatting from "Yes/No" to "Critical/\_" (if needed)
  - Format dates to mm/dd/yyyy

#### Update Pull-Down Lists to only include schedules

- Metrics All schedules
- DateCompare JCL on Analysis Schedule list and IMS on IMS list
- Values set at last valid schedule worksheet name



## SONIC 3, 4 and 5 Features

#### Predecessor (Successor) Determination

- Identify ALL predecessors (successors) for a given schedule activity
- Export basic schedule data to Microsoft CSV file (MS Project compatible)

#### Activity Connections

- Determine existence of connectivity between 2 schedule activities
- Identify path between 2 activity schedules via up to 4 search methods
- Run in Batch-Mode for list of Activity ID pairs

#### Enhanced Metrics

- Activity completion metrics added (total, prior month, subsequent month)
- Normal Activities with Missing Logic metric added

### Keyword Search Reports

- Schedule description keyword search
- Overcomes MS Excel limits with Auto-Filter on very large schedules

### Separate App and database files